

# RICARDO VARGAS EXPLAINS THE PMBOK® GUIDE 7<sup>TH</sup> EDITION

## PRINCIPLES

	<b>STEWARDSHIP</b> Be a diligent, respectful, and caring steward
<b>DESCRIPTION</b> You need to care about the project and feel <b>responsible</b> and <b>committed</b> to delivering value through the project. You should oversee the project with the same level of care you use in your personal life.	<b>KEYWORDS</b> - Care - Honesty - Trustworthiness - Compliance
<b>COMMENTS</b> » The PMI's <b>Code of Ethics</b> is related to this principle, but it is not the same thing. » It demonstrates your <b>duty of care</b> and your behavior towards the project's interest. » It is about being <b>transparent</b> , <b>avoiding conflicts of interest</b> , and following the law.	

	<b>TEAM</b> Create a collaborative project team environment
<b>DESCRIPTION</b> It is <b>impossible</b> to deliver sustainable outcomes without a team that <b>collaborates</b> and <b>works together</b> towards the same objective. Team members must use their specific skills with the aim to fulfill the needs of the team and the goals of the project.	<b>KEYWORDS</b> - Collaboration - Teamwork - Culture - Roles & Responsibilities
<b>COMMENTS</b> » Team collaboration does not necessarily mean <b>friendship</b> . » Organizational <b>culture</b> affects the way teams work together. » It is more efficient and effective to work as a <b>team</b> than alone.	

	<b>STAKEHOLDERS</b> Effectively engage with stakeholders
<b>DESCRIPTION</b> Stakeholders can <b>directly</b> and <b>indirectly</b> influence the project. If you do not engage with them, you may <b>create threats</b> and <b>miss opportunities</b> to optimize the outcomes you should focus on to deliver value.	<b>KEYWORDS</b> - Engagement - Individuals - Groups - Organizations
<b>COMMENTS</b> » They can <b>support</b> or <b>oppose</b> the project work, and their opinion can change over time. » Stakeholders can be <b>internal</b> or <b>external</b> to the organization. » They can <b>come and go</b> during the project life cycle.	

	<b>VALUE</b> Focus on value
<b>DESCRIPTION</b> Successful projects are all about delivering value. It goes <b>above and beyond</b> a simple delivery. Benefits are realized when the target stakeholders perceive the <b>positive value of the outcomes</b> enabled by the deliverables.	<b>KEYWORDS</b> - Outcomes - Success - Business results - Benefits
<b>COMMENTS</b> » There is <b>no point</b> in focusing on <b>schedule</b> and <b>on budget</b> if you do not deliver value. » Value can be <b>realized during</b> or <b>after</b> the end of a project. » The project should <b>NOT</b> continue if it does not deliver the proposed outcome or value.	

	<b>SYSTEMS THINKING</b> Recognize, evaluate, and respond to system interactions
<b>DESCRIPTION</b> Your project is not a bubble. It is a "gear" of a more extensive system that includes several other <b>interdependent agents</b> . It is your responsibility to make sure these interactions are considered and planned.	<b>KEYWORDS</b> - Interdependency - Systems of systems - Integration - Holistic view
<b>COMMENTS</b> » It is essential to balance <b>internal</b> and <b>external</b> perspectives. » <b>Systems may change over time</b> due to internal and external volatilities. » Systems operate <b>beyond</b> the project life cycle and will continue afterward.	

	<b>LEADERSHIP</b> Demonstrate leadership behaviors
<b>DESCRIPTION</b> <b>Projects are complex efforts</b> , and they need strong leadership to get the job done. Aspects like <b>motivation</b> , <b>focus</b> , <b>self-awareness</b> , and <b>facilitation</b> are critical to align the team and overcome the natural level of conflict that may arise.	<b>KEYWORDS</b> - Motivation - Empowerment - Example - Influence
<b>COMMENTS</b> » <b>Anyone</b> in the team can demonstrate leadership skills. » Leadership is <b>different</b> from authority. » There is no single <b>universal</b> leadership style.	

<b>PRINCIPLES</b>
They are the foundation on how we should approach something.
» They guide our behavior and actions.
» They are open, and we can apply them in different ways and contexts.
» They are interconnected.
» There is no specific order or ranking of principles.

## PRINCIPLES

	<b>TAILORING</b> Tailor based on context
<b>DESCRIPTION</b> Your approach cannot be " <b>one size fits all</b> ." It must be <b>adapted</b> to fit the corresponding work, organization, and cultural aspects, aiming to increase benefits and maximize value.	<b>KEYWORDS</b> - Predictive (waterfall) - Iterative (agile) - Hybrid - Swiss Army knife
<b>COMMENTS</b> » There is no " <b>best</b> " methodology. » There is only a " <b>right</b> " methodology for a specific case. » The delivery method can be a <b>mix</b> of different approaches and methods.	

	<b>QUALITY</b> Build quality into processes and deliverables
<b>DESCRIPTION</b> Quality is the way the deliverables <b>connect to the objectives</b> and the <b>value chain</b> . Your probability of providing business benefits is dramatically reduced if you cannot produce project deliverables that meet the requirements.	<b>KEYWORDS</b> - Satisfy needs - No defects - Fit for purpose - Conformity
<b>COMMENTS</b> » Quality is all about <b>fulfilling the requirements</b> . » Quality can be <b>measured</b> . » Focus on <b>detection</b> and <b>prevention</b> of errors and mistakes.	

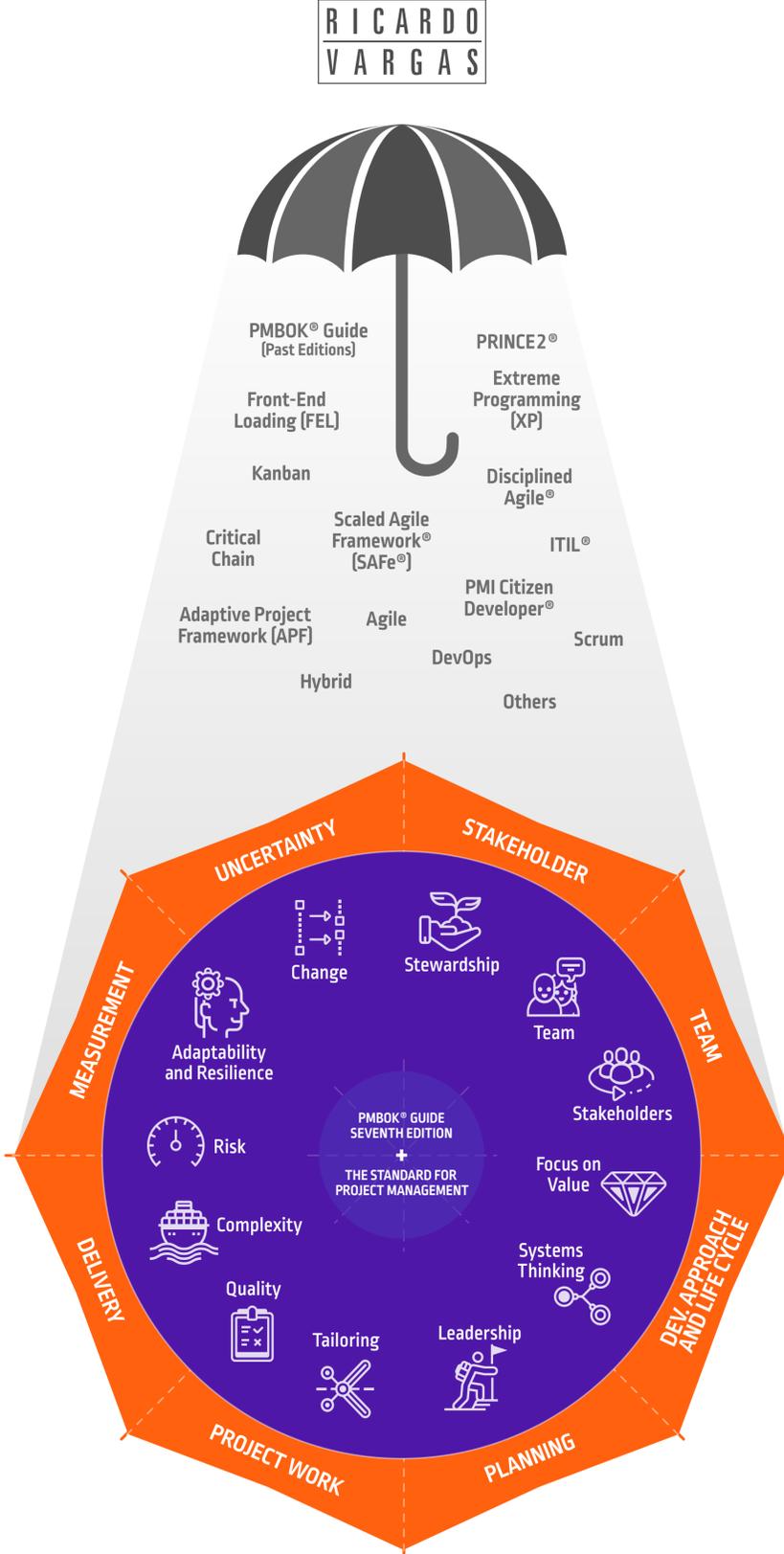
	<b>COMPLEXITY</b> Navigate complexity
<b>DESCRIPTION</b> You must look for ways of accepting the complexity of the environment you are in. Volatility, Uncertainty, Complexity, and Ambiguity (VUCA) are parts of any project. <b>Shift your focus from avoiding complexity to assessing and reacting when needed</b> .	<b>KEYWORDS</b> - VUCA - Ambiguity - Uncertainty - Volatility
<b>COMMENTS</b> » Complexity arises from different factors, and most of them are <b>outside of our control</b> . » It can be <b>increased</b> or <b>decreased</b> at any point of the project. » <b>Indicators</b> and <b>triggers</b> are critical tools to navigate complexity.	

	<b>RISK</b> Optimize risk responses
<b>DESCRIPTION</b> Risks are part of every single project. You need to <b>proactively assess the project exposure</b> and <b>respond</b> effectively to potential threats and opportunities that may affect the project's ability to deliver value.	<b>KEYWORDS</b> - Threats - Opportunities - Risk tolerance - Risk appetite
<b>COMMENTS</b> » Each organization has a <b>different tolerance</b> to risks, and this affects their actions. » Probability and impact <b>change over time</b> . » Risks can be inside or outside <b>your control</b> .	

	<b>ADAPTABILITY AND RESILIENCY</b> Embrace adaptability and resiliency
<b>DESCRIPTION</b> Your resiliency will allow you to " <b>build back better</b> " after a setback. If you or your organization are not adaptable and resilient, it will be tough to accept change and recover from problems.	<b>KEYWORDS</b> - Recovery - Adaptability - Resilience - Diversity
<b>COMMENTS</b> » Resiliency is built by improving the <b>capacity of absorbing impact</b> and <b>recovering</b> . » Adaptability increases by <b>focusing on the outcomes</b> and not on a specific delivery. » <b>Team diversity</b> improves the capability of developing adaptability and resiliency.	

	<b>CHANGE</b> Enable change to achieve the envisioned future state
<b>DESCRIPTION</b> Change is the <b>only permanent feature</b> of any project. You must act as a change agent and create the <b>conditions for others to adapt</b> to a rapid and evolving environment.	<b>KEYWORDS</b> - Psychological safety - Enablement - Comprehensive - Resistance
<b>COMMENTS</b> » Change is <b>NOT</b> necessarily a bad thing. » Enabling change is the <b>opposite</b> of avoiding change. » Keep the <b>desired outcomes</b> in mind when evaluating changes.	

<b>PERFORMANCE DOMAINS</b>
Group of related activities that are critical for the delivery of the outcomes.
» There is no prescriptive sequence to execute these activities.
» They can be used with different delivery approaches (predictive, agile, hybrid).
» They are not processes.
» They are interactive, interdependent, and interrelated.



## PERFORMANCE DOMAINS

<p><b>STAKEHOLDER</b></p> <p><b>DESCRIPTION</b> Combines a set of activities related to stakeholders, including the engagement process to ensure that there are <b>productive working relationships with stakeholders</b>.</p> <p><b>COMMENTS</b> » Contains relevant elements of <b>communications</b>. » Includes activities to address <b>supporting</b> and <b>opposing</b> stakeholders. » It is <b>not about friendship</b>. It is about a productive relationship. » <b>Stakeholders change</b> during the project. » Not all stakeholders are the same. They have different <b>interests</b> and <b>influences</b>.</p>	<p><b>TEAM</b></p> <p><b>DESCRIPTION</b> Contains activities that address the <b>responsibilities</b> associated with the work that must be done to deliver business value.</p> <p><b>COMMENTS</b> » Includes the <b>roles</b> and <b>responsibilities</b> within the team. » <b>Team culture</b> must be built, including norms and behaviors. » Very connected to the <b>leadership principle</b>. » Includes components of <b>emotional intelligence</b>, <b>critical thinking</b> and <b>motivation</b>. » Strong emphasis on <b>shared ownership</b>.</p>	<p><b>DEVELOPMENT APPROACH AND LIFE CYCLE</b></p> <p><b>DESCRIPTION</b> It is the domain where the delivery approach (<b>predictive, iterative, hybrid</b>) is selected, and the life cycle, phases, and cadence are defined.</p> <p><b>COMMENTS</b> » A project may have a <b>single deliverable</b> or <b>multiple, periodic</b> or <b>continuous deliverables</b>. » <b>Predictive approach</b> is based on <b>defined requirements</b>. » <b>Iterative or adaptive approach</b> is useful when there is a <b>high level of uncertainty</b>. » <b>Hybrid approach</b> combines aspects of <b>both</b> predictive and iterative approaches. » <b>Many factors</b> affect the selection of your approach (risks, innovation, stability, funding).</p>	<p><b>PLANNING</b></p> <p><b>DESCRIPTION</b> Contains the activities associated with the required <b>coordination</b> and <b>organization</b> to produce the deliverables.</p> <p><b>COMMENTS</b> » Strongly related to the <b>Development Approach</b>. » <b>Predictive planning</b> uses WBS and decomposition models to break down the scope. » <b>Iterative planning</b> uses the concept of <b>evaluating multiple options</b> until costs may exceed benefits. » Describes concepts of <b>estimating, scheduling</b> and <b>budgeting</b> using different approaches. » It has some aspects of the <b>planning process group</b> of the PMBOK® Guide 6th edition.</p>
<p><b>PROJECT WORK</b></p> <p><b>DESCRIPTION</b> Addresses all activities related to the <b>actual work</b> like physical resources, contracting, managing change, and continuous learning capability.</p> <p><b>COMMENTS</b> » Includes reviewing the project work using <b>lessons learned, retrospective</b>, and <b>lean methods</b>. » Actions related to reducing <b>work in progress (WIP)</b> take place in this domain. » Several <b>procurement</b> processes happen under the Project Work Domain, especially contracting activities. » Very closely connected to the <b>Tailoring</b> and <b>Change</b> principles. » It has some elements of the <b>executing process group</b> of the PMBOK® Guide 6th edition.</p>	<p><b>DELIVERY</b></p> <p><b>DESCRIPTION</b> Combines the activities and work associated with the project's delivery, including <b>requirements, quality</b>, and <b>change</b>.</p> <p><b>COMMENTS</b> » Requirements can be clear in <b>predictive development</b>. » In the <b>adaptive approach</b>, requirements may only be clear at <b>later stages</b>. » Includes aspects of <b>Cost of Quality (COQ)</b> like <b>prevention</b> and <b>correction</b>. » <b>Stakeholder acceptance</b> and <b>satisfaction</b> is a key performance factor to evaluate deliverables. » <b>Fail fast, learn fast</b> approach can support the handling of <b>suboptimal outcomes</b>.</p>	<p><b>MEASUREMENT</b></p> <p><b>DESCRIPTION</b> Includes the activities that <b>measure project performance</b> to allow actions to be taken to ensure the desired results are achieved.</p> <p><b>COMMENTS</b> » It is impossible to evaluate results if you do not <b>measure them</b>. » Measurement goes <b>above and beyond reporting and data</b>. » Measurement is all about <b>conversations</b> and <b>decisions</b> using the data. » Covers <b>leading and lagging</b> indicators (KPI) and what is an effective metric. » Aspects of <b>Earned Value Analysis, dashboards, Kanban</b> and other visual ways of reporting are presented by this domain.</p>	<p><b>UNCERTAINTY</b></p> <p><b>DESCRIPTION</b> Assures that the project contains activities that address <b>risks, uncertainty</b>, and <b>VUCA</b> (volatility, uncertainty, complexity, and ambiguity) and its environment.</p> <p><b>COMMENTS</b> » Despite not being mentioned in the guide, the VUCA concept is a critical aspect of this domain. » Strongly connected to the <b>Systems Thinking, Complexity</b> and <b>Risk</b> principles. » <b>Early warning</b> and <b>environmental scanning</b> are relevant activities to address uncertainty. » The "Risk" knowledge area of the PMBOK® Guide 6th edition is closely related to this. » Uncertainty, as well as risks, are <b>not necessarily negative</b>. They can be opportunities.</p>



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Explanatory Note: This work does not replace the need to read the PMBOK® Guide and the Standards for Project Management. It is an educational material to help project managers and other professionals to understand the publication in an easier and direct way.

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